



The **Surveys** tool, which is currently released as a Beta version, enables the creation of **anonymous** surveys. It provides a means of surveying site participants for the purposes of course experience feedback, or delivering research and data collection surveys to *ad hoc* group(s) or the general public.

A **wide range of question types are available for flexible design and structure**, while detailed settings control whether lecturers and tutors are being evaluated, how participants access the survey, and who may view the results.

If a survey is delivered to named participants, the system can send out regular reminders to survey recipients who have yet to complete the survey (frequency of reminders is configured by the survey author). Although the system can identify those participants who have not yet responded, **it is not possible to identify individual responses** – this assurance of anonymity encourages more candid responses than might otherwise be offered.

Several reporting options are available to help you collate and analyse participants' responses. Once a survey is closed, the survey results can be viewed in WebLearn or exported in spreadsheet or PDF format.

**Creating surveys:** Only those with the **maintain** or **contribute** role are able to create surveys. When setting up a survey, you choose who the recipients will be, e.g. site participants, *ad-hoc* groups, or the general public.

**Typical use & good practice tips:** You need to start by creating a new template on which to base your survey. Once a template has been created, you can reuse or modify it to form another template. Templates are private and cannot be shared, although you can pass ownership of a template to another person with the **maintain** or **contribute** role.

If the **Surveys** tool is not currently visible in your site then you may need to add it. Use **Site Info > Edit Tools** to do this.

This guide explains the process of creating templates, building a survey based on a template, assigning survey respondents, viewing results and other details about building and delivering online surveys.

Other useful step-by-step guides to read in conjunction with this one:

- Site Management – Site Info
- Using the WYSIWYG HTML editor
- Resources

All step-by-step guides are available from [weblearn.ox.ac.uk/info](http://weblearn.ox.ac.uk/info)

## **Other useful resources**

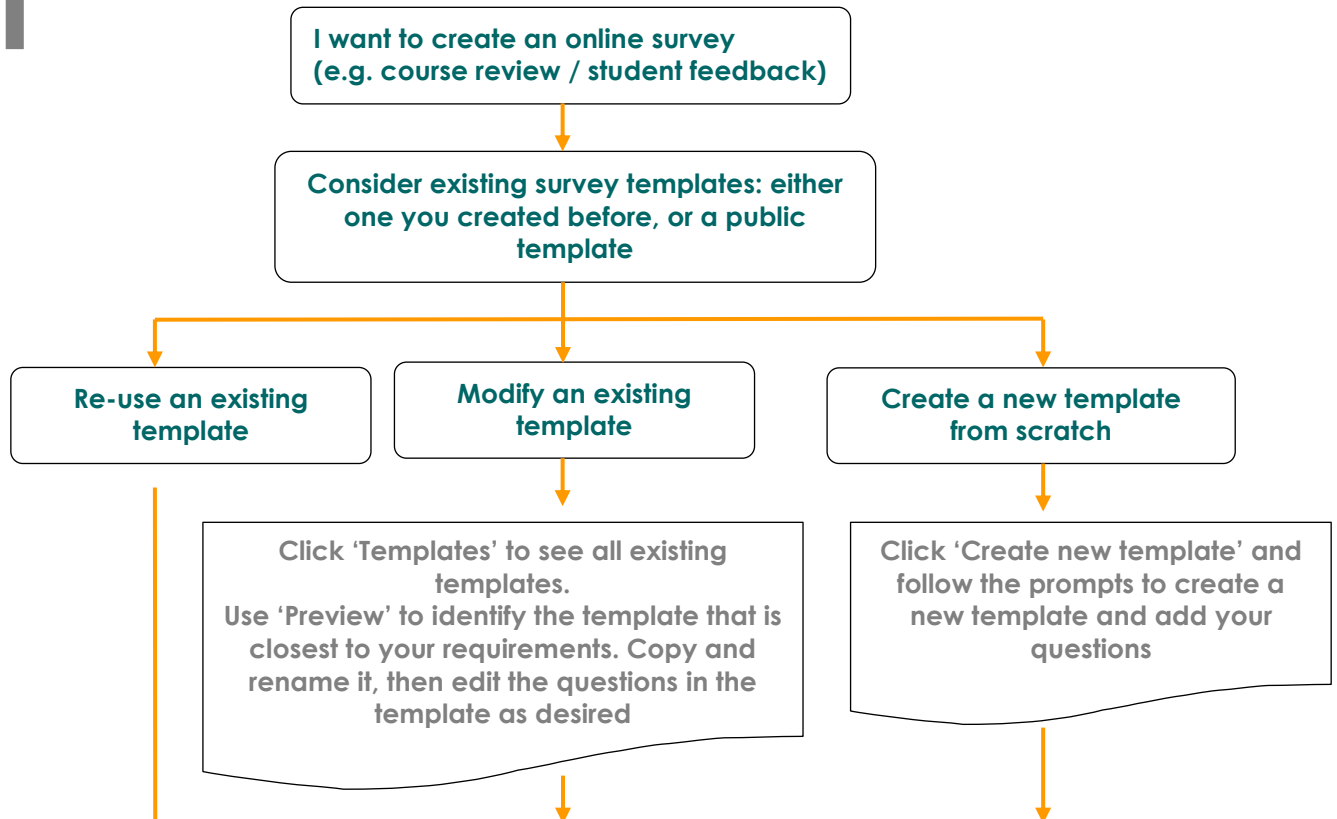
Oxford Learning Institute:

- Evaluation of teaching: <http://www.learning.ox.ac.uk/oli.php?page=43>

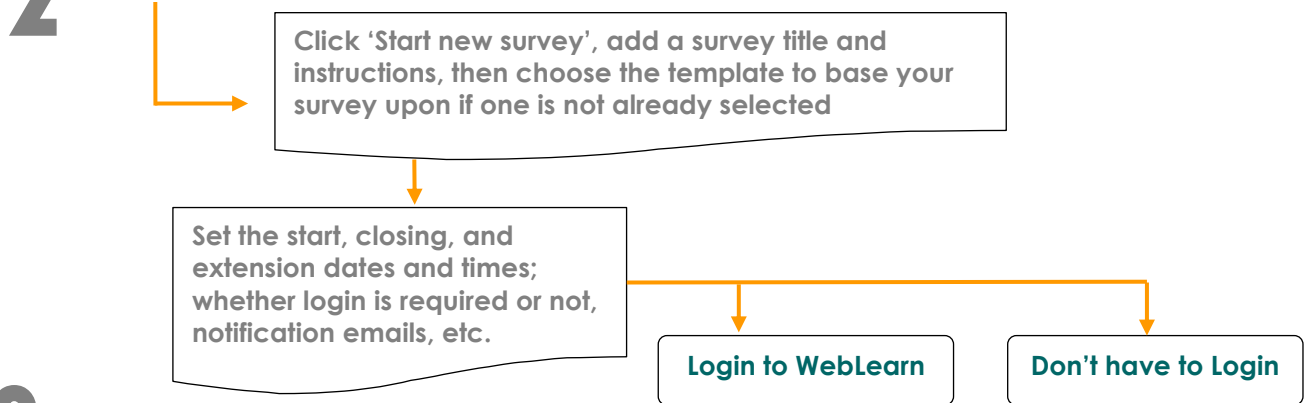


# Overview: How to create an online survey in WebLearn

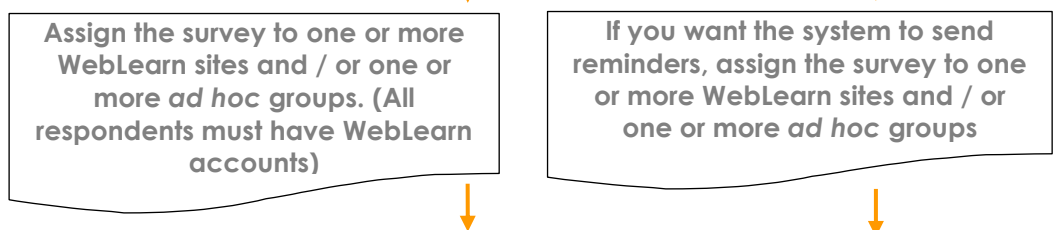
## 1 Create a new or select an existing survey template



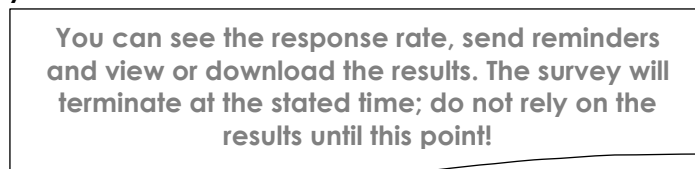
## 2 Create your survey and configure the settings



## 3 Assign the survey to a group of recipients



## 4 Run the survey and view results



## Create your template

You need to log into a WebLearn site in which you have the **maintain** or **contribute** role; (participants with the **access** role cannot create templates or surveys). Click on the **Surveys** tool from the tools menu or, if not present, **add** the tool to your site. By default, you will be looking at your **Survey Dashboard**.

There are several links available on this page:

[Survey Dashboard](#), [My Surveys](#), [Templates](#), [My Email Templates](#) along the top, and

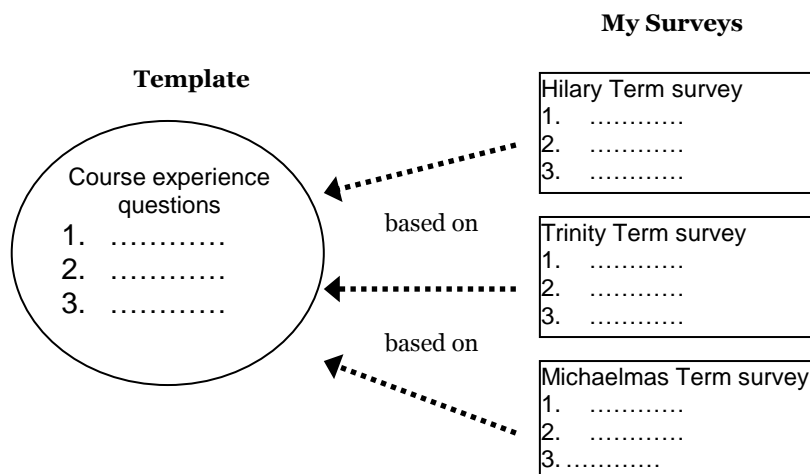
[+](#) [Create new template](#) and [+](#) [Start new survey](#) on the right hand side.

1. [Survey Dashboard](#): this is the overall starting page for all activities involving your templates and surveys.
2. [My Surveys](#): this page shows you list of all your surveys in the following categories:
  - Partially complete surveys,
  - Surveys awaiting release,
  - Current surveys and
  - Completed surveys.
3. [Templates](#): this page provides a list of all your private templates that you have created, as well as public university-wide templates that you may use.

The main functions are described in detail below, in a recommended order.

### **Look at existing templates** ([Templates](#))

The **Surveys** tool uses **templates** to generate **surveys**. A **template** consists of a set of questions which can be used as the basis for one or more **surveys**.



A template is merely a list of questions, whereas a survey has a start date, a finish date and other delivery settings (specifications). You can create a survey based on an **existing template** or a **new template**.

Go to the [Templates](#) page to view the list of your existing templates, including **public templates**, to see if one may be suitable for your needs. Use [Preview](#) to view the template. For surveys where you are not the **owner**, some options will be greyed out.

Surveys (Help) (Info)

Survey dashboard | My Surveys | **Templates** | My Scales | My Email Templates

Survey dashboard > Templates + Create new template

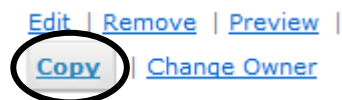
### Templates

Your templates are the basis for your surveys. Each template consists of any necessary instructions and the questions that you want your respondents to fill in.

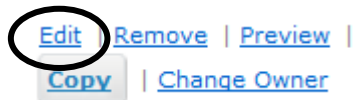
Templates	Owner	Last changed	
Career Skills Course Evaluation <a href="#">(Web link)</a>	Jill Fresen	22-Jul-2010	<a href="#">Edit</a>   <a href="#">Remove</a>   <a href="#">Preview</a>   <a href="#">Copy</a>   <a href="#">Change Owner</a>
College Graduate Feedback Template <a href="#">(Web link)</a>	Adam Marshall	11-Aug-2010	<a href="#">Edit</a>   <a href="#">Remove</a>   <a href="#">Preview</a>   <a href="#">Copy</a>   <a href="#">Change Owner</a>
College Student Experience Survey Template <a href="#">(Web link)</a>	Fawei Geng	06-Jul-2010	<a href="#">Edit</a>   <a href="#">Remove</a>   <a href="#">Preview</a>   <a href="#">Copy</a>   <a href="#">Change Owner</a>
Evaluation of a Lecture Series Template <a href="#">(Web link)</a>	Adam Marshall	11-Aug-2010	<a href="#">Edit</a>   <a href="#">Remove</a>   <a href="#">Preview</a>   <a href="#">Copy</a>   <a href="#">Change Owner</a>
Induction Survey Template <a href="#">(Web link)</a>	Adam Marshall	11-Aug-2010	<a href="#">Edit</a>   <a href="#">Remove</a>   <a href="#">Preview</a>   <a href="#">Copy</a>   <a href="#">Change Owner</a>

If you find a template that mostly meets your needs, then copy and modify it:

1. Click **Copy** alongside the template you wish to modify.



2. Another template with the same title followed by **(copy)** will be added to the list. Your name will be listed as the owner of the template.
3. Click **Edit** next to the template that you've just copied.



4. On the **Edit Template** page, in the first block, click **Edit** to change the title and notes.
5. Reorder, edit, add and remove questions as required.
6. To see the template as a whole, click **Preview** alongside the template title.

### Create your own template from scratch ( [+ Create new template](#) )

If there is no existing template available, or none of the existing templates come close to suiting the needs of your survey, you can create a new template:

- Click [+ Create new template](#) on the **Dashboard** or the [Templates](#) page.
- Give your template a title and complete the notes field if necessary. (The notes are for the author's benefits, and are not available seen by survey recipients.)



**NOTE: Templates** can be used many times over for different sites, so the title and notes should summarise the function of the template, rather than its application through a specific survey e.g. 'End of term course feedback' rather than 'Old English feedback TT2011'.

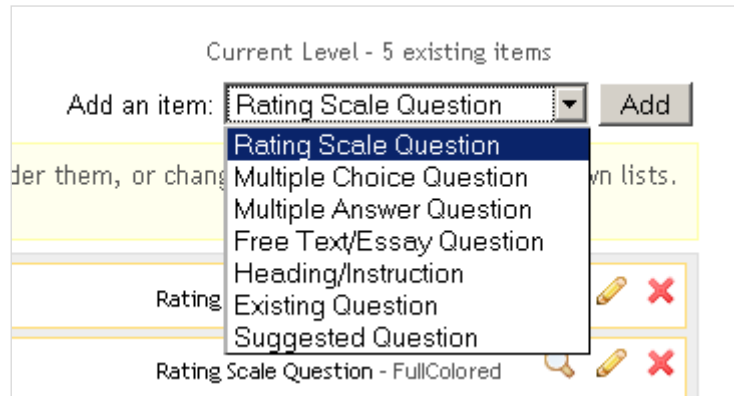


### WARNING:

Templates are private to the person who created them. See later in this guide how to change the owner of a template if you wish others to use or edit it.

## Adding questions

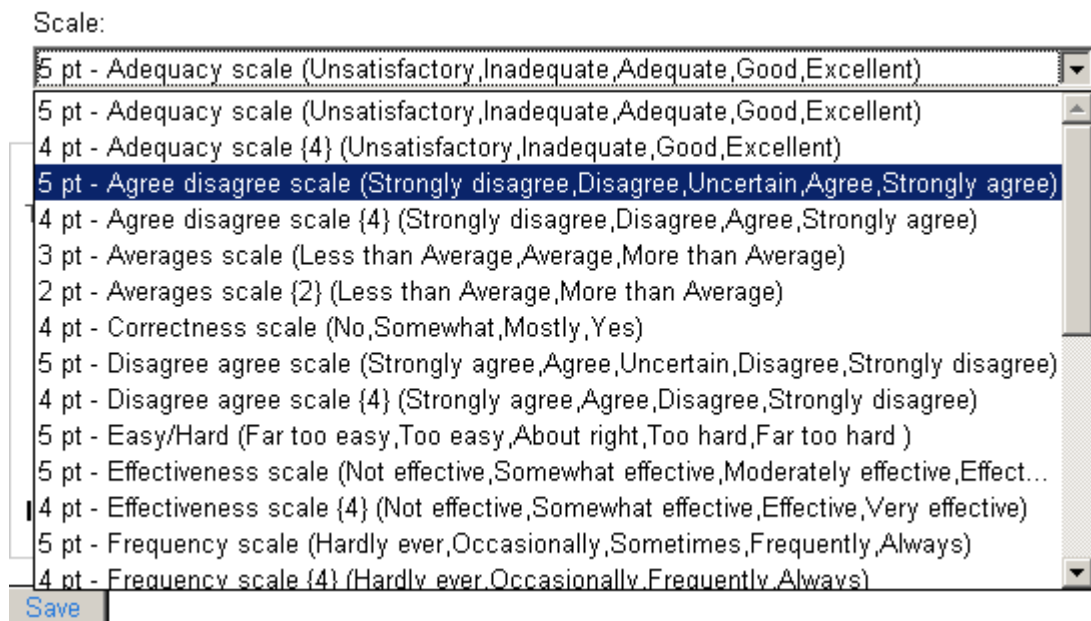
On the next page, add your questions using the **Add an item** dropdown box.



The following types of questions are available:

- **Rating Scale (Lickert Scale)**

Various built-in scales are provided with pre-set text descriptors. Some of the many examples are:



If none of the built-in scales is suitable for your purposes, you can create your scale-type question in the form of a multiple choice question (see below). Alternatively, if you think your scale-type question may be widely used, you can send an email to [weblearn@oucs.ox.ac.uk](mailto:weblearn@oucs.ox.ac.uk) requesting that your scale be added to the existing scales that are available in the tool.



**Tip:** Consider the argument for a scale with an even number of options, to avoid having respondents mindlessly selecting the 'Neutral' option.

- **Multiple Choice Question**

This is a multiple choice question in which only one response can be selected. The responses are indicated in the survey using round radio buttons, which implies that only one option may be selected.

The default setting provides two options: 'Yes' and 'No' - these may be edited (max 255 letters). More options can be added by clicking on **Add Scale Point**:

Yes	Remove
No	Remove
	Remove
Add Scale Point	

- **Multiple Answer Question**

This is a multiple choice question in which more than one response can be selected. The responses are indicated using square check boxes, allowing more than one option to be selected.

- **Free Text/Essay Question**

The type of question provides a text box for the respondent to answer an open question. The author can allow 2, 3, 4, or 5 lines of text to be entered by the respondent.

- **The Heading/Instruction option**

This is not a type of question, but rather a structural mechanism, in which headings or sub-headings can be entered, for example to divide the questions into groups or categories. Alternatively it can be used to supply instructions to the respondents.

- **Existing Question**

This option allows you to pick from the pool of all questions you have created previously for other templates, so that you can reuse any of them in this template.

- **Suggested Questions**

These are pre-packaged, standard questions that are provided by the system, in four categories. Click on a Category and then follow the steps illustrated by the line diagram:

**Suggested Questions**

Suggested Questions (1) Choose Category (2) Choose Objective (3) Choose Items

Click on a category to see objectives within it

Category	Description
<a href="#">Assignments</a>	Measure the perception of out of class assignments
<a href="#">Exams</a>	Measure the perception of examinations
<a href="#">Instructor Effectiveness</a>	Determine the perceived effectiveness of the instructor
<a href="#">Student Development</a>	Determine how student development is perceived

Cancel

## Use of images, audio and video

You can insert images, or links to audio and video files in a question, by using the HTML WYSIWYG editor whilst authoring your question.



**Compact layout (text only for ends of scale):**

7. Assignments were interesting and stimulating      Unsatisfactory      Excellent

**Compact layout (with colours):**

4. The tutor handled questions well      Strongly agree      Strongly disagree

**Full width showing all options:**

8. The tutor handled questions well

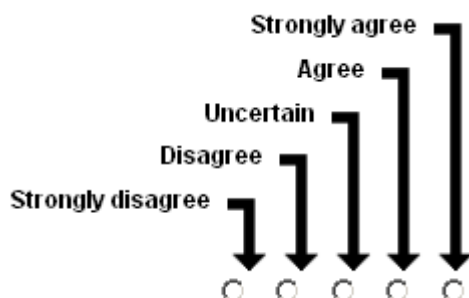
Strongly disagree     Disagree     Uncertain     Agree     Strongly agree

**Full width + colours:**

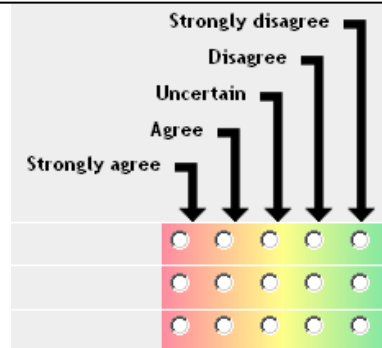
1. The instructor taught in a manner that served my needs

Strongly disagree     Disagree     Uncertain     Agree     Strongly agree

**Stepped layout (one question)**



**Compact layout + colours (three grouped questions)**



Questions with the same rating scale can be grouped together so that they appear as one compact block instead of many separate questions

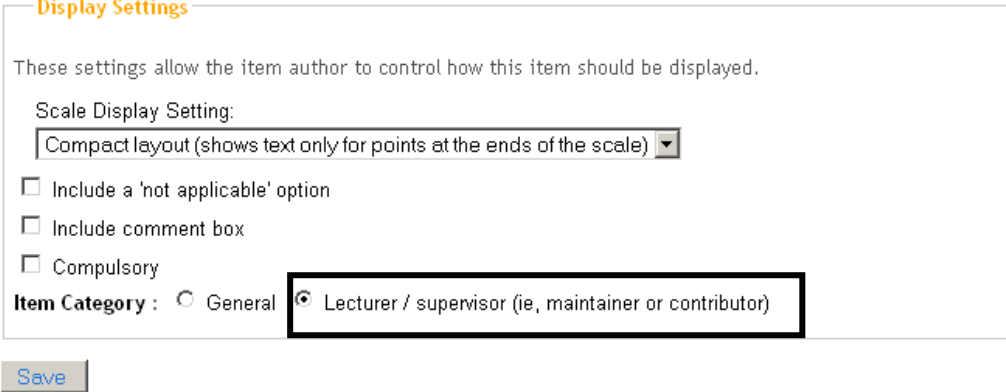
**Vertical list**

8. The tutor handled questions well

- Strongly disagree
- Disagree
- Uncertain
- Agree
- Strongly agree



You can choose whether to add a 'not applicable' option, whether to allow a **comment**, and whether to make the question **compulsory** (Note that free text questions cannot be made compulsory):



**Display Settings**

These settings allow the item author to control how this item should be displayed.

Scale Display Setting:  
Compact layout (shows text only for points at the ends of the scale)

Include a 'not applicable' option

Include comment box

Compulsory

Item Category :  General  Lecturer / supervisor (ie, maintainer or contributor)

Save

### Repeating question sets to evaluate lecturers and tutors

By default, questions are put in a **General** category and will be displayed in the order you choose. If you are collecting course feedback and your survey is assigned to one or more WebLearn sites, then you can have a **set of questions repeated** for each lecturer and/or tutor (i.e., participants with the **contribute** and **maintain** role in each site); select the **Lecturer / supervisor** category. If you assign the survey to more than one site, then participants will be expected to fill in more than one survey; each will be based on the same template but will present a different list of lecturers / supervisors.

#### Important notes:

1. To **test the question sets** for multiple lecturers/tutors, add at least two people (including yourself with your gmail/other account) with the **access** role to a **test** WebLearn site containing at least one person with the **maintain** or **contribute** role – the 'lecturer' or 'tutor'.
  - Log in with your gmail (or other) account
  - Go to your **Survey Dashboard** (via the **Surveys** tool in your test site)
  - Click on the survey title and make sure that the relevant instructor names have been inserted instead of '**Instructor 1**' and '**Instructor 2**'
2. If a site contains administrative/IT support staff with the **maintain/contribute** role, their names will also appear in the survey, to be evaluated. One way around this is to make other maintainers/contributors **inactive** via Site Info **before** you assign the survey to a site. However you cannot make **yourself** inactive! If you want to avoid having your name appear as an instructor to be evaluated by students, please contact [weblearn@it.ox.ac.uk](mailto:weblearn@it.ox.ac.uk). Please provide the site URL and request that we remove the 'be evaluated' permission from the **maintain** role on that site.

The following page shows a preview of the **Lecturer / supervisor** option. The same four questions are repeated for all site members with the **contribute** or **maintain** role; the labels "**Instructor 1**" and "**Instructor 2**" will be replaced in the actual survey with their respective names:

Questions about your lecturer **Instructor 1**

1. The instructor taught in a manner that served my needs

Strongly disagree  Disagree  Uncertain  Agree  Strongly agree

2. The instructor explained material clearly and understandably

Strongly disagree  Disagree  Uncertain  Agree  Strongly agree

3. The instructor appeared to have a thorough knowledge of the subject and field

Strongly disagree  Disagree  Uncertain  Agree  Strongly agree

4. The instructor handled questions well

Strongly disagree  Disagree  Uncertain  Agree  Strongly agree

Questions about your lecturer **Instructor 2**

5. The instructor taught in a manner that served my needs

Strongly disagree  Disagree  Uncertain  Agree  Strongly agree

6. The instructor explained material clearly and understandably

Strongly disagree  Disagree  Uncertain  Agree  Strongly agree

7. The instructor appeared to have a thorough knowledge of the subject and field

Strongly disagree  Disagree  Uncertain  Agree  Strongly agree

8. The instructor handled questions well

Strongly disagree  Disagree  Uncertain  Agree  Strongly agree

## Identifying Respondents




Since all surveys are anonymous by default, if you need to identify respondents, you will need to make the first question a **Free Text/Essay** type question, requesting the respondent to type in their name, or their college, or whatever other information you require from them.

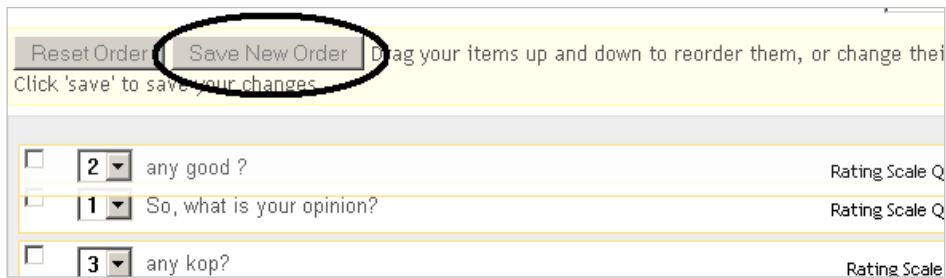
## Organising your template



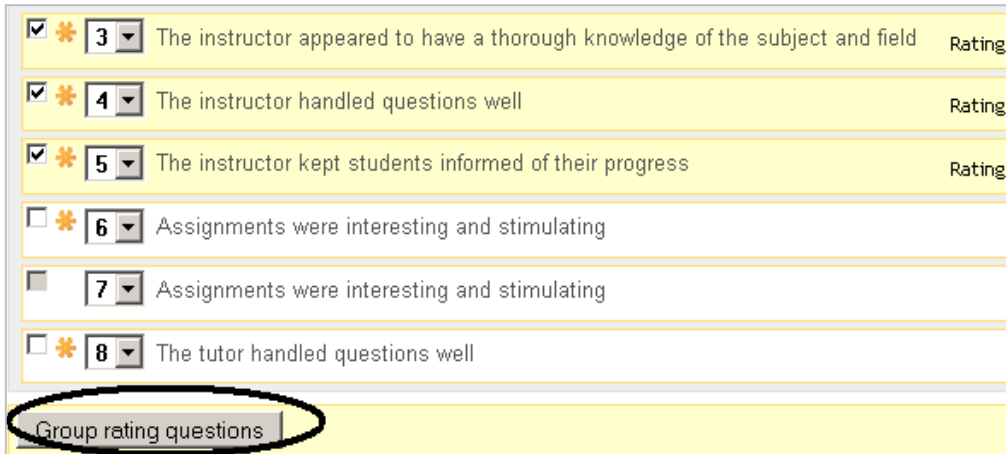
Be sure to check and re-check your template and all the details of all the questions it contains. If there are typos or spelling errors in a template and you create a survey based on it, the survey will NOT be corrected if you later correct any errors in the template.

Once you have created/added all your required questions, you can preview, reorder, group, edit or remove questions on the **Edit Template** page:

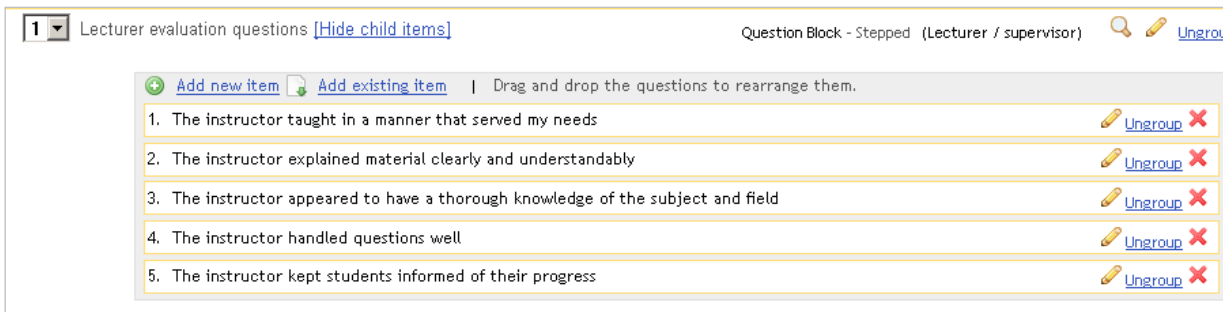
- **Preview:** Click on the  icon to preview the question.
- **Edit:** Click on the  icon to edit the question. (Note this does not currently work well with Internet Explorer.)
- **Delete:** Click on the  icon to remove the question
- **Reordering:** You can **re-order** your questions by dragging the rows up and down, or by changing their number in the drop-down box. Remember to click **Save new order!**



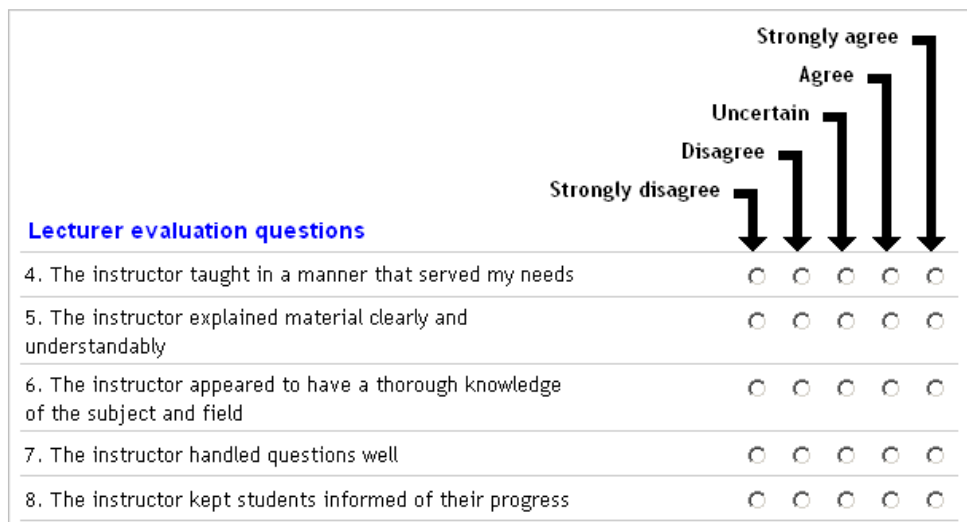
- **Grouping:** Questions with the same rating scale can be selected and grouped together to appear as one compact block instead of separate questions, simply tick the check boxes. Remember to click **Group rating questions** to save your changes.



The questions have been grouped together, and can be ungrouped if you change your mind later.



Respondents will see this block of questions like this:



## Changing ownership of templates (or surveys) to allow collaborative authoring

By default, the templates and surveys you create are private – no one else may see or edit them. However, it is possible to ‘share’ your template/survey with your colleagues (e.g. fellow lecturers in your department or faculty). Templates/surveys are ‘shared’ by passing the ownership from one individual to another. To do this, simply click on the [Change Owner](#) link on the [Templates](#) page.

**Surveys**

Survey dashboard | My Surveys | **Templates** | My Scales | My Email Templates

Survey dashboard ▶ Templates + Create new template

**Templates**

Your templates are the basis for your surveys. Each template consists of any necessary instructions and the questions that you want your respondents to fill in.

Templates	Owner	Last changed	
Career Skills Course Evaluation <a href="#">(Web link)</a>	Jill Fresen	22-Jul-2010	<a href="#">Edit</a>   <a href="#">Remove</a>   <a href="#">Preview</a>   <a href="#">Copy</a>   <a href="#">Change Owner</a>
College Graduate Feedback Template <a href="#">(Web link)</a>	Adam Marshall	11-Aug-2010	<a href="#">Edit</a>   <a href="#">Remove</a>   <a href="#">Preview</a>   <a href="#">Copy</a>   <a href="#">Change Owner</a>
College Student Experience Survey Template <a href="#">(Web link)</a>	Fawei Geng	06-Jul-2010	<a href="#">Edit</a>   <a href="#">Remove</a>   <a href="#">Preview</a>   <a href="#">Copy</a>   <a href="#">Change Owner</a>
Evaluation of a Lecture Series Template <a href="#">(Web link)</a>	Adam Marshall	11-Aug-2010	<a href="#">Edit</a>   <a href="#">Remove</a>   <a href="#">Preview</a>   <a href="#">Copy</a>   <a href="#">Change Owner</a>
Induction Survey Template <a href="#">(Web link)</a>	Adam Marshall	11-Aug-2010	<a href="#">Edit</a>   <a href="#">Remove</a>   <a href="#">Preview</a>   <a href="#">Copy</a>   <a href="#">Change Owner</a>

You can also change ownership of a survey by clicking [Change Owner](#) on the [Surveys](#) page:

**Surveys**

Survey dashboard | **My Surveys** | Templates | My Scales | My Email Templates

Survey dashboard ▶ My Surveys + Start new survey

**Surveys awaiting release**

None

**Current surveys**

None

**Completed surveys**

Survey	Reminders	Recipients	Response Rate	Due Date	Owner
<a href="#">Physics - student evaluation of recorded lectures</a>	<a href="#">View Results</a>   <a href="#">Edit</a>   <a href="#">Remove</a>   <a href="#">Re-open</a>   <a href="#">Change Owner</a>	<a href="#">B6 Condensed Matter</a>	<a href="#">30 / --</a>	31-Aug-2015	Jill Fresen
<a href="#">Physics - using recorded lectures</a>	<a href="#">View Results</a>   <a href="#">Edit</a>   <a href="#">Remove</a>   <a href="#">Re-open</a>   <a href="#">Change Owner</a>	<a href="#">Public ad-hoc group for Physics -</a>	<a href="#">0 / --</a>	31-Aug-2015	Jill Fresen

Next you are asked to supply an email address or username of the new owner:

Click **Save** and the template/survey will be transferred to the new owner. In order to be able to access the template/survey, the new owner must have the **maintain** or **contribute** role in at least one site.

The new owner can make edits and then pass the template along to a future owner (or back to the original owner). This feature effectively allows the authoring of **Survey** templates to be a collaborative process.

## Create your survey and configure the survey settings

Every survey must be based on a template. To set up a new survey, click **Start new survey** on either the **Dashboard**, **My Surveys** or **Edit Template** page.

### Create your survey

1. Give your survey a meaningful title e.g. 'Old English feedback TT2011' (remember that respondents will see this title)
2. Provide instructions to your respondents in the text box. These instructions will appear at the top of the survey.
  - If you have too much text to put in the instructions box, then upload a file to **Resources** in any WebLearn site which you control. Then place a hyperlink to it in the instructions box (this is a bit like adding an attachment). To be safe, make the instructions file public, unless you plan to assign the survey to a WebLearn site (see later in this guide), in which case, store the file in that site.
  - If the survey is to be assigned to an ad hoc group then either make the file public or if this is not desirable, create a site for the ad hoc group and assign the survey to that site instead.
3. If you haven't already done so, select a template you'd like to use from the list provided
4. If you wish to use 'Lecturer Questions' but want to exclude some of the participants with the **maintain** or **contribute** role from this evaluation (if, for example, they are not lecturers), set those participants to **Inactive** in the *WebLearn* site before you assign the survey. After you have assigned the survey, remember to set them back to **Active**. (The reason is that a 'snapshot' of site membership is used when the survey is created; modifying site participants later means that new people will **not** be able to answer the

survey, and removed people **will still be able to do so** – See section later: *Adding recipients to an ongoing survey.*)

Survey dashboard ▶ Start new survey ▶ **Survey Settings**

**Survey title:**

Title: Old English feedback TT2013

Instructions: This short survey contains 5 questions to evaluate the course. We appreciate your feedback.

Will appear at the top of the survey.

Template: Course evaluation template Apr 2011 (copy) [\(Preview\)](#) [\[Edit\]](#)

After you have selected the required template, you see the **Survey Settings** page, with the title and instructions you have already entered. Note that you can [Preview](#) or [Edit](#) the selected template and its questions at this point – you may want to modify just one or two questions for a particular survey. Editing questions in a template in this way will **not** permanently change the original template.

### ***Configure the Survey Settings***

Complete the rest of the form on the **Survey Settings** page:

1. Set the **opening and closing dates** and times

**Survey Dates**

Current date is 26 May 2010 at 10:55

Start Date	13/05/10		00:00
Closing Date	14/05/10		00:00
Extension Date	14/05/10		00:00

You have the option of allowing people to continue to respond until the extension date is past.

2. Select who can **view the results**

### Survey results:

Results sharing:  Private  Configurable  Public

\* Note that admins above in the hierarchy can view your survey results unless you tick the

- |                                     |   |        |
|-------------------------------------|---|--------|
| <input type="checkbox"/>            | Participants taking this survey can see the results                         | Result |
| <input checked="" type="checkbox"/> | Maintainer/Contributor to which this survey is assigned can see the results | Result |

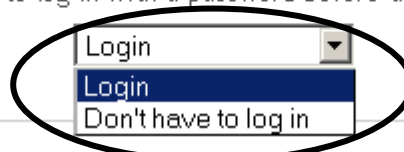
The **Survey Results** settings will determine who can see the results. There are three options:

- **Private:** only you can see the results; the two check box settings have no effect.
  - **Configurable:** if this is selected then the two check boxes will determine visibility:
    1. If **Participants taking this survey can see the results** is selected then all intended respondents may see the results regardless of whether they completed the survey.
    2. If **Maintainer / Contributor to which this survey is assigned can see the results** is selected then **all** participants with the **maintain** and **contribute** role in the site(s) to which the survey was assigned will be able to view all the results. This applies only to people who were in the site(s) at the time the survey was created. It is not possible to add new participants later and expect them to view the results.
  - **Public:** all those who know the URL can view the results; the two check box settings have no effect.
3. Choose how survey respondents will **access the survey:**

### Survey Administrative Settings

Do you wish your respondents to log in with a password before they can take the survey?

Survey respondents



A screenshot of a web form showing a dropdown menu for 'Survey respondents'. The dropdown is open, showing three options: 'Login', 'Login', and 'Don't have to log in'. The first 'Login' option is highlighted in blue. A black oval is drawn around the entire dropdown menu.

- Select **Login** if you want to control access to the survey. Responses will remain anonymous, but you will be able to track who has or has not completed the survey and the system will be able to send reminders to non-respondents. If one or more of your intended respondents is an external user they will require an existing WebLearn account (if they don't have one, an error message will appear when you try to assign the survey to participants). If you intend to assign the survey to one or more WebLearn sites then **Login** is the preferred option as it ensures the integrity of the survey.
- Select **Don't have to login** for a survey which can be taken by respondents who do not have WebLearn accounts, or are not required to login, e.g. you may want to publish your survey on a public web site. This is also a good option for people who you think may not know their Oxford SSO username and password.
- If you select **Don't have to login** and then assign the survey to a WebLearn site or an ad-hoc group of named participants, the system cannot track who has or has not completed the survey; thus any automatic reminders (see below) will go to all respondents, regardless of whether or not they have completed the survey.

☞ See later in this guide for a summary of how this option works when you assign the survey to participants.

#### 4. Decide on the **Question-level settings**:

If you selected **Login** above, it is suggested good practice to allow respondents to return and change their answers whilst the survey remains open; this setting is selected by default. Respondents will be able to submit the survey, then return to it before the closing date and change their answers, if desired.

**Question-level settings**

Allow questions to be left unanswered  
(Free-text/Essay questions are never compulsory, and can thus always be left unanswered).

Respondents may change their answers

All roles may take the survey  
Allow site members with the maintain and contribute role to take this survey (in addition to access users)

By default, only site participants with the **access** role may take a survey. Select **All roles may take the survey** if you want participants with the **maintain** and **contribute** roles to be able to respond.

If you selected **Don't have to login** previously, then the default option **Respondents may change their answers** will be automatically greyed out, since the system cannot identify respondents or their answers:

**Question-level settings**

Allow questions to be left unanswered  
(Free-text/Essay questions are never compulsory, and can thus always be left unanswered).

Respondents may change their answers

All roles may take the survey  
Allow site members with the maintain and contribute role to take this survey (in addition to access users)

☞ Note: If no login is required, then **All roles may take the survey** is invalid – this box will also be greyed out in future updates to the tool.

#### 5. Decide on how to manage the **Survey Notification and Reminders**:

By default, a notification email will be sent to specified recipients when the survey opens. You can de-select this box if you **do not** want to send an opening notification; you can also edit the default text for the notification message. The message will appear to come from your email account – this can be changed lower down in this section.

**Survey Notification and Reminders**

Please check all details in this list before saving your survey settings.

An email will be sent out to your respondents when the survey opens. [View and edit the notification email](#) The default email is designed for surveys to evaluate student courses and may not be appropriate for other kinds of surveys.

☞  Send notification email the day the survey opens.

Reminders

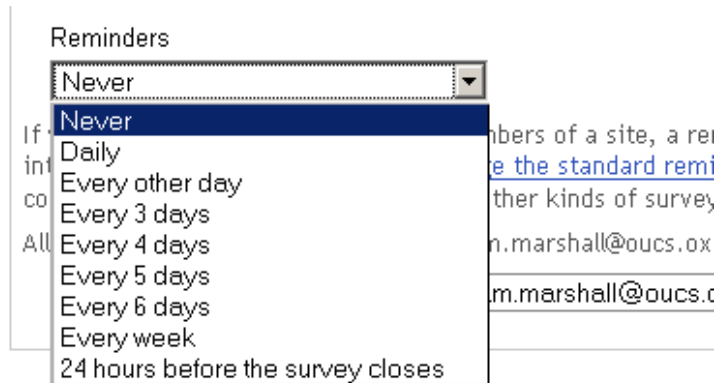
Never

☞ Note: due to a limitation of 'Oxmail' (the University mail relay service), the Surveys tool will only send emails to the first 1000 recipients. If you plan to have more recipients,



you will need to send emails manually (i.e. not from within the **Surveys** tool). If you need to send over 1000 emails, it is advisable to seek guidance from your local ITSS officer.

6. Choose the frequency of email reminders; the default is **Never**:



Reminders

Never

Never

Daily

Every other day

Every 3 days

Every 4 days

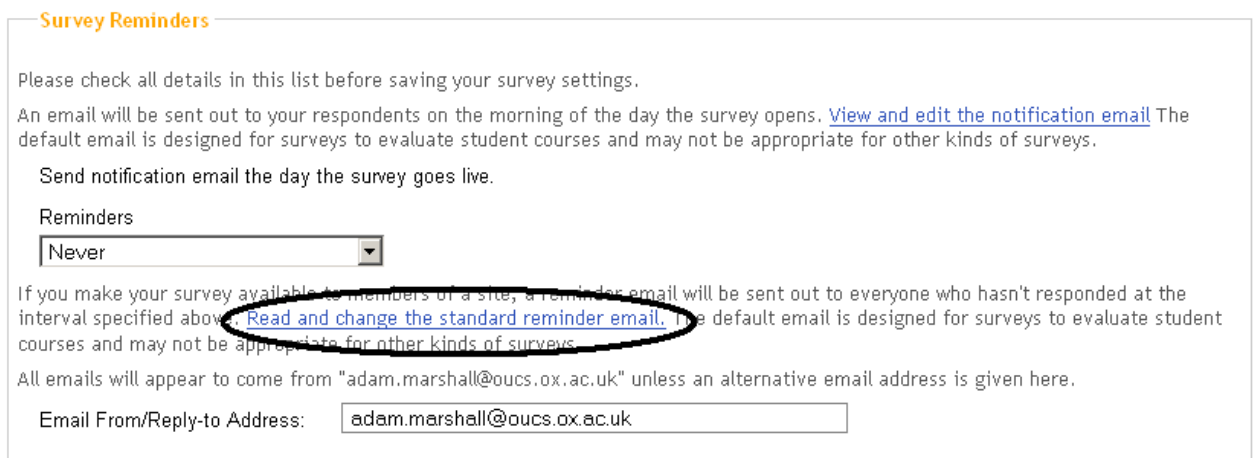
Every 5 days

Every 6 days

Every week

24 hours before the survey closes

7. Decide whether you wish to edit the standard reminder email:



**Survey Reminders**

Please check all details in this list before saving your survey settings.

An email will be sent out to your respondents on the morning of the day the survey opens. [View and edit the notification email](#) The default email is designed for surveys to evaluate student courses and may not be appropriate for other kinds of surveys.

Send notification email the day the survey goes live.

Reminders


Never

If you make your survey available to members of a site, a reminder email will be sent out to everyone who hasn't responded at the interval specified above. [Read and change the standard reminder email.](#) The default email is designed for surveys to evaluate student courses and may not be appropriate for other kinds of surveys.

All emails will appear to come from "adam.marshall@oucs.ox.ac.uk" unless an alternative email address is given here.


Email From/Reply-to Address:

## Email messages sent by the system

 **Note:** due to a limitation of 'Oxmail' (the University mail relay service), the Surveys tool will only send emails to the first 1000 recipients. If you plan to have more recipients, you will need to send emails manually (i.e. not from within the **Surveys** tool). If you need to send over 1000 emails, it is advisable to seek guidance from your local ITSS officer.

Various kinds of email messages can be sent by the **Surveys** tool (automatically or manually) to respondents and/or survey creators:

1. Optional notification that the survey is available - this includes the URL and the closing date. All maintainers and contributors will always receive this message, regardless of any settings.
2. Automatic reminders - you can set the frequency and content of the reminders as described above. Remember:
  - If you selected the **Login to WebLearn** option (the system **can** tell who has not responded): the standard reminder will be sent to non-respondents only
  - If you selected the **Don't have to login** option (the system **cannot** tell who has or has not responded): with the exception of a public survey, the standard reminder will go to **all respondents**, regardless of whether or not they have completed the survey
3. You can also send manual reminders, at any time, if necessary, using the **Reminders** option next to the applicable survey on the [My Surveys](#) page:

Current surveys					
Survey	Responses	Report		Reminders	Recipients
<a href="#">Testing text boxes truncated (Web link)</a>	25% ( 1 / 4 )	Awaiting 1 more responses	<a href="#">Edit</a>   <a href="#">Close Now</a>		<a href="#">Basic layout</a>

- Survey closed/View Results message – as the survey creator you will always receive this message. Respondents may receive this message too, depending on your survey settings.

### ***Assign the survey to a group of recipients***

#### TIPS:

- Skip this step if your survey is intended to be publicly available.
- Even if login is **not** required, you may still assign the survey to one or more groups; this will mean that notifications and reminders can be sent to all members of the group.


On the **Assign Survey** page, you can assign the survey either to (1) a *WebLearn* site, or (2) to an ad-hoc group that you create. You **MUST** assign the survey to a *WebLearn* site if you wish to evaluate lecturers who are **maintainers** (or **contributors**) in that site.

- Use the **Assign to WebLearn site participants** option if your intended respondents are participants in one or more *WebLearn* sites. If a site shows a grey tick box, it means it has too few members to survey.

If you assign the survey to a *WebLearn* site, then:

- A *snapshot* is made of the current site membership – site participants added later will **not** be able to answer the survey (see how to re-assign the survey later in this guide: *Adding recipients to an ongoing survey*)
- There must be at least 2 people with the access role in your site, and at least 2 people must have completed the survey before you will be able to view response rates or results

**Step 3 of 4 - Assign survey to respondents**

 Assign to WebLearn site participants

You can set this survey to be taken by the sites, sections and groups below

Select	Site or Group
<input type="checkbox"/>	Adam's Site
<input checked="" type="checkbox"/>	ASUC (Academic Services & Collections)
<input type="checkbox"/>	Advisory Committee
<input type="checkbox"/>	Algebras, coalgebras & monads
<input checked="" type="checkbox"/>	All Souls
<input checked="" type="checkbox"/>	Anonymous online submissions
<input type="checkbox"/>	Another LTG Demo Site

2. Choose the **Assign to an ad hoc group** option if your intended respondents are a general group of people specified by email address (or username): Please note that an *ad hoc* group needs to have at least one member in it, and you can create the group from the following screen:

Select	Site or Group
<input type="checkbox"/>	Cheeky monkeys <a href="#">edit</a>
<input type="checkbox"/>	Imps <a href="#">edit</a>
<input type="checkbox"/>	ITS3 Linux course attendees 2010 <a href="#">edit</a>
<input type="checkbox"/>	Little tykes <a href="#">edit</a>
<input type="checkbox"/>	Naughty scamps <a href="#">edit</a>
<input type="checkbox"/>	test - delete <a href="#">edit</a>
<input type="checkbox"/>	test ad hoc group <a href="#">edit</a>
<input type="checkbox"/>	Tinkers <a href="#">edit</a>

If you need to create the *ad hoc* group, then click on the link [Create a new Adhoc Group now](#). Enter the email addresses or usernames of your intended respondents, then click on [Back to Assign Survey page](#) to return to the above screen.


Once you have selected or created the group(s) of respondents, click **Next** and **Finish**. Your survey has now been created and will be delivered; it is at this point that the initial notification will be sent out to your intended respondents, if you retained that default option.


To preview your survey, click the survey title, which is a hyperlink.

### ***Adding recipients to an ongoing survey***

When you assign a survey to a group of named respondents (either a WebLearn site or an ad-hoc group that you create), the **Surveys** tool keeps a 'snapshot' of that list of respondents.


You can **add** recipients to an ongoing survey by modifying the list (in either the WebLearn site or an ad-hoc group), but then you **must** re-assign the survey to the updated group. If you simply modify the list of participants in a WebLearn site without re-assigning the survey, then new participants will **not** be able to take the survey.

 Note: if you remove participants from a WebLearn site or an ad-hoc group, these people **can still take the survey** since they remain on the original list of potential respondents.

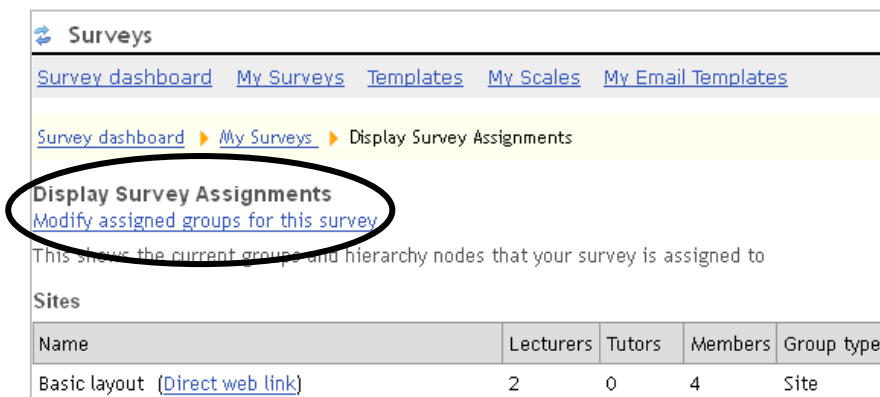
 When you reassign an existing survey to a new group, or update a group, the new participants will NOT receive a notification about the survey being available.

### **Re-assign the survey to a modified group of respondents as follows:**

Find the survey in your list of [Current Surveys](#) and click on the group title under **Recipients**:

Survey	Responses	Report	Reminders	Recipients
<a href="#">Testing</a> <a href="#">text boxes</a> <a href="#">truncated</a> <a href="#">(Web link)</a>	25% ( 1 / 4 )	Awaiting 1 more responses	<a href="#">Edit</a>   <a href="#">Close Now</a>	 <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">Basic layout</span>

Then select [Modify assigned groups for this survey](#):



The screenshot shows the 'Surveys' navigation menu with 'My Surveys' selected. Under 'My Surveys', 'Display Survey Assignments' is highlighted. Below this, the option 'Modify assigned groups for this survey' is circled in red. A table below shows the current assignments:

Name	Lecturers	Tutors	Members	Group type
Basic layout <a href="#">(Direct web link)</a>	2	0	4	Site

This will take you back to the step described above (*Assign the survey to a group of recipients*), so that you can assign this survey to either the newly updated WebLearn site or an ad-hoc group (which you can edit at this point).

## Summary of completion tracking and sending reminders

When you assign the survey to either a *WebLearn* site, or an **ad-hoc group**, then the respondents are **known to the system**. (Note that all surveys are always anonymous since no-one can identify who said what).

Whether or not respondents' completion of the survey is tracked, and who receives reminders (if this option is selected by the survey creator), depend on the **Login/Don't have to log in** setting in the **Survey Settings**.

The various combinations are summarised in the following table:

	<b>Login</b>	<b>Don't have to login</b>
<b>WebLearn site participants</b>	<ul style="list-style-type: none"> <li>Known respondents</li> <li>Tracking of completion</li> <li>Non-respondents get reminders</li> </ul>	<ul style="list-style-type: none"> <li>Known respondents</li> <li><b>No tracking</b></li> <li><b>All get reminders</b></li> </ul>
<b>Ad-hoc groups</b>	<ul style="list-style-type: none"> <li>Must have WL account</li> <li>Known respondents</li> <li>Tracking of completion</li> <li>Non-respondents get reminders</li> </ul>	<ul style="list-style-type: none"> <li>Known respondents</li> <li><b>No tracking</b></li> <li><b>All get reminders</b></li> </ul>
<b>Unassigned (general public)</b>	<b>XXX</b>	<ul style="list-style-type: none"> <li><b>Unknown</b> respondents</li> <li><b>No tracking</b></li> <li><b>No reminders</b></li> </ul>

## Run the survey and view results

### Run the survey

If the survey has been assigned to one or more groups:

- by default, the system will send a notification email that the survey is available with the link to complete it. If you assigned the survey to a *WebLearn* site, then site participants can complete the survey via the **Surveys** link on the tools menu on the left hand side in a *WebLearn* site that contains the tool.


If no groups have been assigned and login is not required:


- you can email the web link of the survey to the intended respondents, or add it to a web page, which can be a *WebLearn* site or a public website.

### Check progress of responses

Whilst the survey is open you will not be able to make any changes to the questions. On your [My Surveys](#) page you will be able to view the results so far, and see the response rate (**Note:** to preserve anonymity in a survey that requires login, a minimum of two people must have responded before you can view the results; for a public survey, results can be viewed at any time).

- Alongside your survey title, click on the link in the column **Responses** (x/y); when a survey does not require login it is not possible to know the expected number of respondents, so this is indicated as (x/--).

Survey	Responses	Report		
<a href="#">Building a Research Group</a> 1 (Web link)	2 / --	<a href="#">View Results</a> <a href="#">Edit</a>   <a href="#">Close Now</a>		

- On the Response Rate page, you can choose to send a manual email reminder to all or one or more of the assigned groups. You can also do this by clicking on the envelope icon 

[Survey dashboard](#) ▶ [My Surveys](#) ▶

**Evaluation Responders**  
**Responses for MLF Finance I course questionnaire (21-Jan-2011 - 18-Feb-2011) (17 responded out of 34)**  
[Send email message to MLF Finance I course questionnaire participants](#)  
**Group: MLF students (17 responded out of 34)** [Send email message to MLF students participants](#)

User Name	Status	
-----------	--------	--

- You can view the current state of responses by clicking **View Results** link; remember never to rely on any responses until the survey has finished - this is particularly pertinent if you have allowed respondent to change their answers.

Current surveys				
Survey	Responses	Report		
<a href="#">Building a Research Group</a> 1 (Web link)	<a href="#">2 / --</a>	<a href="#">View Results</a>   <a href="#">Edit</a>   <a href="#">Close Now</a>		

### View the results

You can view the results by clicking **View Results** link on the [My Surveys](#) page. Remember never to rely on any responses until the survey has finished; this is particularly pertinent if you have allowed respondent to change their answers.

Survey		Recipients	Response Rate	Due Date
<a href="#">LECTURE Survey</a>	<a href="#">View Results</a>   <a href="#">Edit</a>   <a href="#">Remove</a>   <a href="#">Re-open</a>	<a href="#">Basic layout</a>	<a href="#">1 / --</a>	31-Dec-2009
<a href="#">Maths Institute Questionnaire for</a>	<a href="#">View Results</a>   <a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Basic layout</a>	<a href="#">0 / --</a>	31-Dec-2009

By clicking on the **Response Rate** statistic [x/y](#), you will be able to see a list of site participants and if they were required to log in, an indication of whether or not they have taken the survey. You will **not** be able to see what responses were given by any particular individual. More than two people must have responded, otherwise it will show 'Not Taken' for all, for purposes of anonymity.

**Group: MLF students (18 responded out of 34)** [Send email message to MLF s](#)

User Name	Status
A...	Completed
H...	Completed
K...	Completed
S...	Not Taken
A...	Completed
I...	Completed
M...	Completed
E...	Completed
D...	Completed
B...	Not Taken
J...	Not Taken

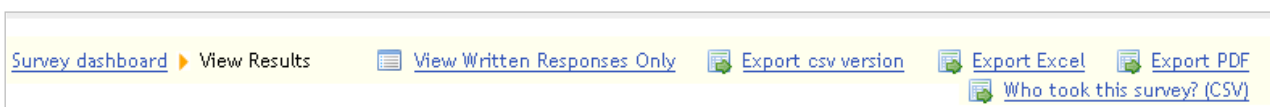
You may view the results on screen or export them (see next section).

In both the onscreen view of results and the exported PDF report, the **statistical mean** is provided. Note that this may or may not be meaningful, depending on the question, the rating scale and the number of responses. The mean is calculated as a weighted average, with the first scale option worth 1 point, the second scale option worth 2 points and so on. For example, in a 5-point rating scale question, the first scale option is allocated 1 point regardless of whether it represents 'strongly agree' or 'strongly disagree'. The Sakai community is working on improving the way the mean is calculated and displayed.

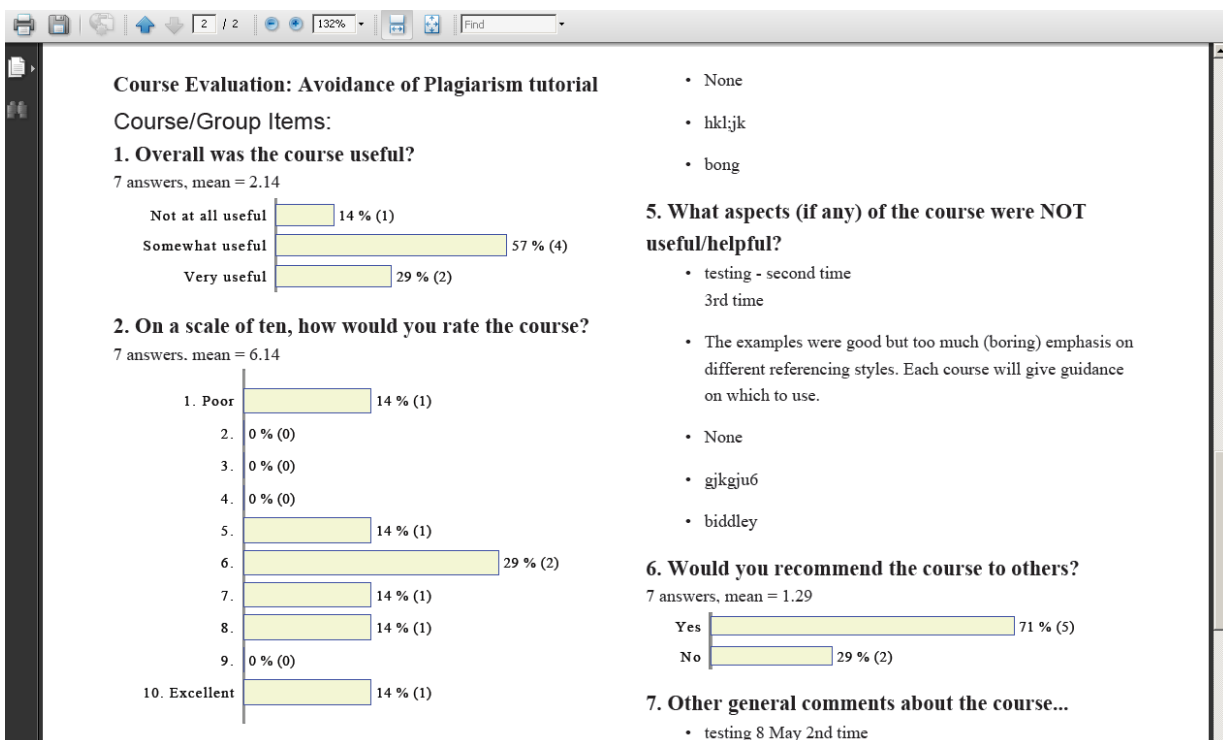
Course/Group Items:	
1. I have learned something new in this course.	2 responses
Strongly disagree	1 (50%)
Disagree	0 (0%)
Agree	0 (0%)
Strongly agree	1 (50%)
2 answers, mean = 2.50	

## Export the results

Various export options are available at the top of the **View Results** page, including CSV, Excel and PDF files. You will get a separate report for each group that the survey was assigned to:



Example of PDF report, showing frequencies and bar charts:



Example of Excel (.xls) output:

Course_Evaluation_Avoidance_of_Plagiari.xls											
	A	B	C	D	E	F	G	H	I	J	K
1	<b>Course Evaluation</b>	Start Date	Closing Date								
2	7 / --	17/11/2009 00:00	21/05/2010 16:24								
3	Participants: Avoiding Plagiarism										
4	Group	Group	Group	Group	Group	Group	Group	Group			
5	Multiple Choice/Multiple Choice Question/Free Text/Essay Question/Free Text/Free Text/Multiple Choice/Free Text/Essay Question										
6	Overall was th	On a scale of ten, h	What aspects (if any	What impr	What aspe	Would you	Other general comments about the course...				
7	1	Somewhat us	5.	testing - 623456;34ic	testing - at	testing - se	Yes	testing 8 May 2nd time	3rd time		
8	2	Somewhat us	6.	In the age of Pubnet	Given that	The exam	Yes	We are planning on making this compulsory			
9	3	Somewhat us	6.				Yes				
10	4	Very useful	8.	A clear description o	Clearer attribution of v	Yes	Is it possible to get a certificate for completi				
11	5	Very useful	10. Excellent	overview over all diffe	None	None	Yes	very useful - I had no idea that plagiarism an			

Example of .csv output:

Course_Evaluation_Avoidance_of_Plagiari.csv											
	A	B	C	D	E	F	G	H	I	J	K
1	Group	Group	Group	Group	Group	Group	Group				
2	Multiple Choice/Multiple Choice Question/Free Text/Essay Question/Free Text/Free Text/Multiple Choice/Free Text/Essay Question										
3	Overall wa	On a scale	What aspe	What impr	What aspe	Would you	Other general comments about the course...				
4	Somewhat	5	testing - 62	testing - at	testing - se	Yes	testing 8 May 2nd time	3rd time			
5	Somewhat	6	In the age	Given that	The exam	Yes	We are planning on making this compulsory for all student				
6	Somewhat	6				Yes					
7	Very usefu	8	A clear de	Clearer attribution of v	Yes	Is it possible to get a certificate for completion of the test?					
8	Very usefu	10. Excell	overview o	None	None	Yes	very useful - I had no idea that plagiarism and how to deal				

### Export of multiple response items

If your survey contains multiple response items, i.e. items which allow more than one response, the multiple responses from an individual are exported in a long string all in one cell. Further intervention in *Excel* is required to split the responses into separate cells:

In the *Excel* file, choose the appropriate column and then > **Data >text to columns** and select **commas**. This will create the requisite extra columns.

👉 NOTES:

- You need to make sure you have spare columns to the right of the column being split, or the data in other columns will be replaced by the split column data set. Alternatively you can specify a destination for the split data, such as Column Z.
- If there are commas in the text of the options in the *WebLearn* survey question, this solution will treat them as delimiters and also split them.



## Known issues with the Beta version of the Surveys tool

The **Surveys** tool is a standard Sakai tool that was developed by others in the Sakai community. The Oxford implementation has highlighted a number of issues with the tool which the *WebLearn* team has been able to improve and contribute back into the Sakai community. Nevertheless, some issues remain unresolved, until later updates of the tool.

Please send details of any errors you may encounter to [weblearn@it.ox.ac.uk](mailto:weblearn@it.ox.ac.uk), and include the date and time of the error, as well as a screenshot of what you see.

1. One can create one's own email template for system notifications. It says that the edited version will be used automatically in all your future email messages - but this is not the case; indeed previous email templates cannot be selected. You can still cut and paste text using the mouse though.
2. The number of group members that the survey has been assigned to is not always correctly reported when assigning the survey: you may however proceed with the process of assigning the survey. The count of users is not always correct on the Survey Dashboard either, e.g. “0 responses out of 7”.
3. Ad-hoc groups cannot be deleted, but they can now be renamed (or edited) if desired.
  - See how to do this in the FAQ in the WebLearn Guidance Site: [weblearn.ox.ac.uk/info](http://weblearn.ox.ac.uk/info) > FAQ: “I have assigned my survey but now I want to add some new recipients – how can I do this?” Newly added members (whether in an ad-hoc group or a WebLearn site) can now take the survey. However, if you remove original members then they can still take the survey and are still on the list of potential respondents. You cannot remove people from the recipient list once they have been added.
4. If you set up a group of rating scale questions, click the “group questions” button, but fail to fill in the “Item Header Text”, an irrelevant page is returned.
5. Currently all maintainers and contributors in a WebLearn site to which a survey is assigned receive email notifications regardless of the “Notification” settings.
6. The list of questions on the “Edit Template” page is being cached so doesn't always reflect the true set of questions in the template. This happens with Firefox, as well as possibly with Internet Explorer.
7. Editing an existing survey loses some of the previously ticked checkbox options, e.g.
  - Participants taking this survey can see the results
  - Maintainers/Contributors to which this survey is assigned can see the results
  - All roles may take the surveyYou need to **re-tick** the required boxes.
8. Problems may occur if you try to group (or regroup) questions after changing the rating scale in one or more of the questions. If you reload the frame, or leave the “Edit template” page and then return, it should work alright.
9. Some odd characters may appear in the Excel export of results (e.g. Ã¢Â€Âˆ) – these will be filtered out in future updates to the tool.
10. When you add an option to a multiple choice question with text that is too long and press save, a generic error message is generated. The error message will be improved to explain that a text option is limited to 255 characters.
11. The calculation and display of the statistical mean (in the survey results) requires improvement, e.g. the mean is ‘calculated’ for multiple response items, which may well be meaningless (if the options are not ordinal data, e.g. Magdalen, Trinity, Baliol...).
12. In Firefox and Chrome, when editing a template and trying to re-order questions, the drop down list of numbers does not appear. Questions can still be re-ordered by dragging and dropping them to a different position.